

Exporting for Clientbook

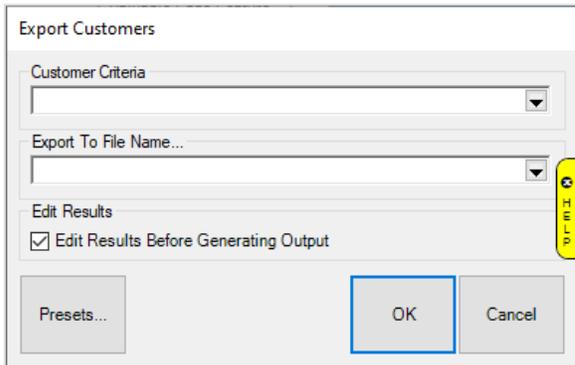
Overview

The **Edge + Clientbook** customers may utilize the **Export** feature in Edge to export customer data from Edge to then import into Clientbook.

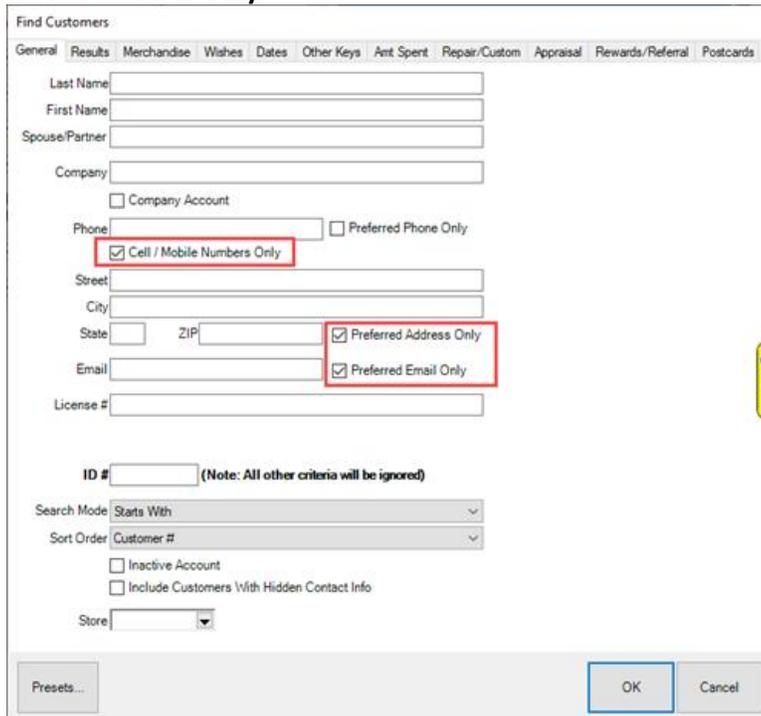
Exporting

To export customers for Clientbook:

1. Click **Customers > Export > For Other**. The **Export Customers** window will appear.



2. Click the drop-down arrow under **Customer Criteria** to open the **Customer Filter**. You may specify any customer criteria you wish to export, but for **Clientbook** you **MUST include** these selections below:
 - a. **General tab**: Check the boxes for **Cell/Mobile Numbers Only**, **Preferred Address Only**, and **Preferred Email Only**:



b. **Results tab:** Under **Addressee**, check **Each Individually**:

The screenshot shows the 'Find Customers' dialog box with the 'Results' tab selected. The 'Addressee' section has three radio buttons: 'Primary Contact', 'Spouse/Partner', and 'Each Individually'. The 'Each Individually' option is selected and highlighted with a red box. Below this are sections for 'Birthday Celebrant', 'Celebrant's Spouse/Partner', and 'Male', 'Female', 'No Gender', and 'Couple'. To the right, there are sections for 'If Gender is Unknown' (with 'Guess Gender' checked), 'If Gender Still Unknown or Does Not Match...' (with 'Exclude customer from results' selected), and 'Spouse/Partner Required' (with 'Include Customers With Or Without Spouse/Partner' selected). At the bottom, there are 'Presets...', 'OK', and 'Cancel' buttons.

3. Once you have finished selecting your criteria, click **OK** to return to the **Export Customers** window.
4. Click the drop-down arrow under **Export To File Name...** and select a location to **save** your exported file.
5. **Name/save** your export in this format: **{YourStoreName}_ClientBook_Export.csv**
6. Email your **Clientbook Customer Success Manager** after saving your export. They will import your file.